

Filters allow users to specify criteria and receive a listing of applicants who meet the specified criteria. Criteria used for filtering can consist of basic filter criteria from the standard application questions, agency-wide questions, job specific supplemental questions, application received date, online/paper application, notification preference, or score)

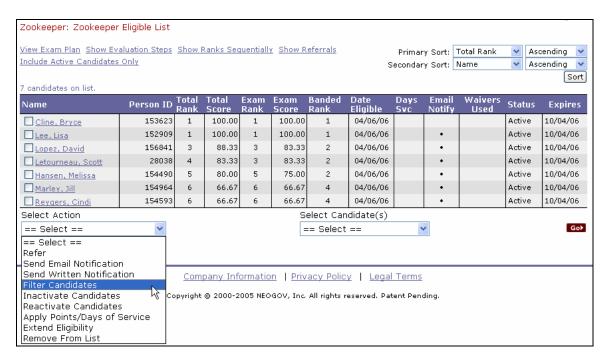
Some examples of how filters that you might want to create include:

- Applicants who speak Spanish
- Applicants who are willing to work nights and weekends
- Applicants who are willing to work at a specific facility or geographical region
- Applicants who applied during a specified time frame
- Applicants who scored between 60% 70% on the written exam

Filtering applicants on the Eligible List

Steps to Create and Apply an Eligible List Filter:

- 1. Access MyHR
- 2. Select 'Eligible' from the 'List' dropdown menu
- 3. The list of active Eligible lists is displayed
- 4. Click on the 'View Candidates' link to display the names on the eligible list for that recruitment
- 5. Select 'Filter Candidates' from the 'Select Action' dropdown menu
- 6. Select 'All Candidates' from the 'Select Candidate(s)' dropdown menu
- 7. Click the 'Go' button





8. Select the criteria you wish to filter on. If multiple criteria is selected, Insight will filter based on **all** criteria selected, i.e. criteria 1 AND criteria 2, etc.

Candidate				Po	erson ID	Sta	tus
Hansen, Melissa					154490	Acti	ive
Lee, Lisa					152909	Acti	ive
Cline, Bryce					153623	Acti	ive
Reygers, Cindi					154593	Acti	ive
Letourneau, Scott					28038	Acti	ive
Marley, Jill					154964	Acti	ive
Lopez, David					156841	Acti	ive
Basic Filter			-1.16				
Job Regular	Work Type	Full Time	Shift Type	□ Day	Langu	ages	American Sign
Temporary	′	Part Time		Evening			Arabic
Seasonal		Per Diem		Night			Chinese
☐ Internship				Rotating			French
				Weekends			German
				On Call (as need	ed)		Hindi
							Hmong
							■ Italian
							Japanese
							Korean
							Laos
							Mien
							Other
							Persian
							Portuguese
							Russian
							Spanish
							Tagalog
							Thai

Filtering Applicants

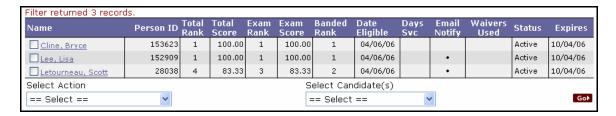
Insight Enterprise

Optional Filter		
Professional License Type		Typing Speed ~ WPM
Agency Wide Question Filter		
	G	Gender: Male
		☐ Female
	Et	Ethnicity White
		Black
		Hispanic
		Asian/Pacific Islander
		_
Are you currently er	nployed by the City of Metr	American Indian/Alaskan Native
Are you currently en	ilployed by the City of Meti	_
		No
How did	you learn about this job op	pening? City Website
		■ Metropolis Times
		City Employee
Have you	u ever been convicted of a f	felony? Tyes
		□No
	What age group do you belo	_
	mnac ago group ao you bon	olidei 10
		18 - 20
		21 - 39
		40 or older
Are you related to anyone wh	works for the City of Metr	ropolis?
		□No
Job Specific Filter		
sob specific rine.	Do you have a high sch	chool dipoma or G.E.D. 🔲 Yes
		□No
	Do you have a valid Calif	fornia driver's license? Yes
	Do you have a valia call	
		□No
How many yea	's experience do you have	working with animals? \square_0
		□ 2
		□ 4
		□ 6
Which types of an	imals have you cared for? ((Check all that apply.) Lions
		Tigers
		✓ Bears
		None of the above
	Filter Now C	Cancel

April 2006 Page 3 of 8



9. Insight returns a list of the applicants who meet the specified criteria:



10. Applicants are displayed in ranked order according to those who meet the filtered criteria. Applicants now can be referred to requisitions as necessary.

Filtering applicants in the Evaluation Steps

Filters on evaluation steps differ from filters on the eligible list in that evaluation step filters can be saved and used again with the exam plan they were created from, or on an evaluation step in another exam plan. Filter criteria based on job-specific supplemental questions will only be used within the applicable exam plan. Job-specific criteria in a filter will be ignored if the filter is used in another exam plan. Filters on evaluation steps allow for the use of both 'And' and 'Or' operators between the criteria.

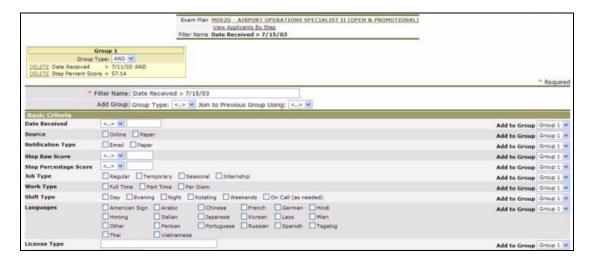
When selecting 'Filter Candidates' from the 'View Applicants by Step' page, you will be taken to the 'Filter Applicants' page. If you have already created and saved one or more filters, they will appear in a drop-down box on the Filter Applicants page, with selections in the drop-down appearing in red if those filters were created from an exam plan other than the one with which you are currently working, and selections appear in black if those filters were created from the exam plan that you are currently in. Selections in black appear before selections in red, and are sub-sorted alphabetically.

If you have one or more saved filters, you will also see buttons for 'Apply Filter' and 'View/Edit Filter.' 'Apply Filter' applies the filter to the candidates chosen in the current evaluation step; 'View/Edit Filter' allows you to view and/or edit the filter you have chosen before applying it. There is also a link at the bottom labeled 'Create New Filter' that allows you to create a brand new filter.

Filters are composed of one or more entities called filter groups. A filter group is a way of grouping individual filter criteria that share the same 'And/Or' criteria. Filters can contain both 'AND' and 'OR' logic. Any number of filter groups can be created within a group type. Each filter group can have either an 'AND' or 'OR' group type.

In addition to group types, which define how criteria within a filter group are joined together, the rules for how each filter group is joined to its adjacent filter group must also be defined. Therefore, for every filter group created, either an 'AND' or OR' operator must be selected to join the group to the previous group.





At the top of the Applicant Step Filter page is a diagram of the filter groups for that filter, which depicts the various filter groups, criteria within each group, and how each filter group is joined to its adjacent filter group.

Below the filter group diagram is an area where the filter name is defined, and below that is an area that allows you to add a new filter group (you will need to select the group type and how that group is to be joined to the previous group).

Following that is an area that allows you to select from a variety of basic filter criteria, including some basic application information, such as the date the application was received, profile information, such as job/shift/work type preferences, and step score information.

Below the basic criteria is Agency-Wide Question criteria, which allows you to select criteria based on the applicant's answers to Agency-Wide questions.

Below the Agency-Wide Question criteria is Job-Specific Question criteria, which allows you to select criteria based on the applicant's answers to Job-Specific questions. Note that if you are editing a filter for an exam plan but are currently working in a different exam plan, the job-specific filter section will not be displayed, since it's not applicable.

At the bottom of the Applicant Step Filter page are two buttons. The 'Update Filter' button allows you to update your filter criteria at any time, as you update filter criteria. The 'Apply Filter' button allows you to apply the filter to the candidates you have chosen (note: the 'Apply Filter' button does not appear if you are not currently working with any candidates). A third button appears when creating a new filter. It reads 'Apply and Save Filter' and this button is used when you want to not only apply your filter, but also make that filter a saved filter – meaning one that can be accessed again after you have applied it. Saved filters, as mentioned before, appear in a drop-down when filtering candidates, which allows you to select that filter again to re-apply it. If you choose the 'Apply Filter' button instead of the 'Apply and Save Filter' button, your filter will be immediately applied to your chosen candidates, but you will never see that filter in any drop-downs at a future date, and therefore you will never be able to re-apply that filter without recreating it.



Saved filters are saved with the exam plan from which they were created; therefore, when on the Exam Plan Detail page, there is a section named 'Filters,' which allows you to see which filters have been created and saved with that exam plan, and also allows you to create a new filter without having to go through an evaluation step to create one.

The 'Save Step View' button on the 'View Applicants by Step' page does not apply to filters that may have been applied to candidates within that exam plan. It only applies to the expanded/collapsed state of evaluation steps and their comments. In other words, applied filters are not persistent in that they will no longer be applied once the user exits the 'View Applicants by Step' page. For example, if the user chooses to filter candidates and applies a filter, the 'View Applicants by Step' page will show the filtered candidates in the related evaluation step. If the user then chooses all of the filtered candidates and chooses 'Change Disposition' to update the candidates' dispositions, the user is returned to the 'View Applicants by Step' page, and the filter will no longer be applied. This is where saved filters become very useful. They can be reused without having to reenter all of the filter criteria again.

NOTE: Criteria such as job type, work type, and shift type will be compared to the candidate's online application, as opposed to their master profile, when the filter is applied.

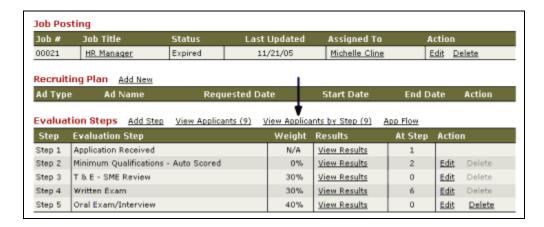
Steps to Create and Apply an Evaluation Step Filter:

- 1. Access MyHR
- 2. Select the 'Exam Plan' option from the 'CandidateTrack' dropdown menu
- 3. The Exam Plan screen is displayed

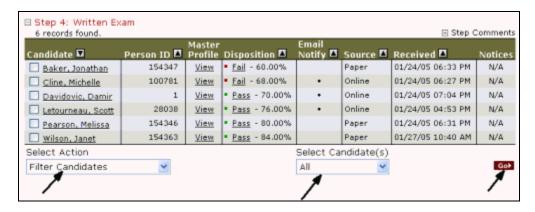


- 4. Click on the Exam Plan Title for the applicable exam plan
- 5. The 'Exam Plan Detail' screen is displayed
- 6. Click on the Evaluation Steps 'View Applicants by Step' link





- 7. Choose 'Filter Candidates' from the 'Select Action' drop-down menu
- 8. Choose candidate(s) from the 'Select Candidate(s)' drop-down menu
- 9. Click 'Go'



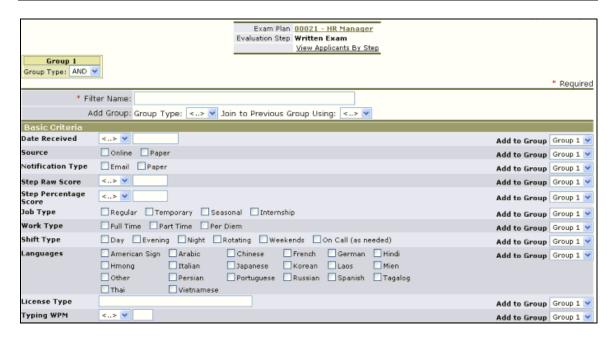
10. Click 'Create New Filter'



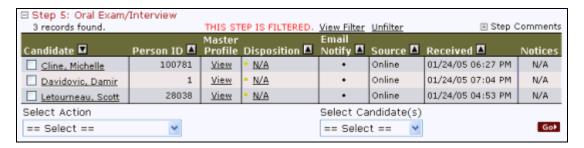
11. The 'Applicant Step Filter' page is displayed:

April 2006 Page 7 of 8





- 12. Enter the 'Filter Name': enter a name that describes the criteria you are filtering on
- 13. Enter the desired criteria and indicate the filter group that the criteria should be assigned to in the 'Add to Group' drop down list.
- 14. To add another filter group, in the 'Add Group' section, specify the applicable 'And/Or' operator in the 'Group Type' and indicate the appropriate 'And/Or' operator to use to join the new group to the previous group
- 15. Select the 'Apply and Save Filter' button at the bottom of the page
- 16. You will be returned to the 'View Applicants by Step' page and can see the filtered list of applicants within the step that you filtered:



April 2006 Page 8 of 8